

Sample Workflow

We have selected one of our frequently used procedures as an example of a process we would like the workflow module to automate and track.

Several times a year employees attend training classes and seminars. Frequently, the training requires employees to travel. The Tribes' policy requires various forms to be completed and approval obtained before employees can embark on their training. After the employees' return, other forms need to be completed. The following is a brief description of the process. The relevant forms are attached.

1. BEFORE TRAINING IS UNDERTAKEN

Two forms must be completed and signed by authorized personnel before arrangements for the training and travel can be made.

1.a. Training and Travel Request Form

- 1.a.i. The employee requesting training will complete and sign the form, and attaches any required back-up documentation (course schedule, etc.).
- 1.a.ii. The form is then signed by the employee's supervisor or department manager.
- 1.a.iii. Finally, the form is signed by the Quil Ceda Village (QCV) General Manager.

1.b. Fiscal Review Form

- 1.b.i. Once the exact cost of the training is known, the employee starts completing the Fiscal Review form by justifying the need for the training, stating the total cost, and signing the form.
- 1.b.ii. Next, the employee's supervisor or department manager adds his/her justification for the training, and signs the form.
- 1.b.iii. Finally, the QCV Finance manager verifies the availability of funds, and signs the form.

1.c. Arrangements for the Training and Travel

- 1.c.i. The completed packet (the two completed and approved forms and all back-up documentation) is forwarded to the executive secretary in charge of making the necessary arrangements.
- 1.c.ii. The executive secretary will register the employee for the requested training, and will make the transportation and lodging arrangements.

- 1.c.iii. If credit cards are used to make the above arrangements, receipts for the charges will be forwarded to QCV Finance.
- 1.c.iv. The executive secretary then forwards the packet to QCV Finance so checks can be issued—if necessary—for registration, lodging, local transportation, and the traveler's per diem.

2. AFTER TRAINING IS COMPLETED

Upon completion of the training, employees will complete two other forms to report on the value of the training, and reconcile their travel expenses.

2.a. Training and Development Report

- 2.a.i. The employee gives a brief description of how the training was beneficial to him/her as well as to the organization, signs the form, and attaches any certifications or diplomas awarded.
- 2.a.ii. Next, the employee's supervisor reviews and signs the form.
- 2.a.iii. Finally, the Human Resources coordinator reviews and signs the form.

2.b. Travel Expense Reconciliation Form

- 2.b.i. The employee completes this form indicating the amounts he/she was advanced for various expenses and the amounts actually spent, attaches a copy of the Training and Development Report, and signs the form.
- 2.b.ii. The employee's supervisor reviews and signs the form, and attaches a copy of the completed and approved Training and Travel Request form (1.a.).
 - 2.b.ii.a. If the employee has spent more than the amounts advanced, he/she is owed a reimbursement. The supervisor attaches a request for a check to be issued to the employee, and submits it for the QCV General Manager's signature.
 - 2.b.ii.b. If the employee has spent less than the amounts advanced, he/she will repay QCV the difference.
- 2.b.iii. The reconciliation packet (completed forms in 2.a. and 2.b. and all back-up documentation) is submitted to QCV Finance.

ATTACHMENTS

- 1. Training and Travel Request Form
- 2. Fiscal Review Form
- 3. Training and Development Report
- 4. Travel Expense Reconciliation Form